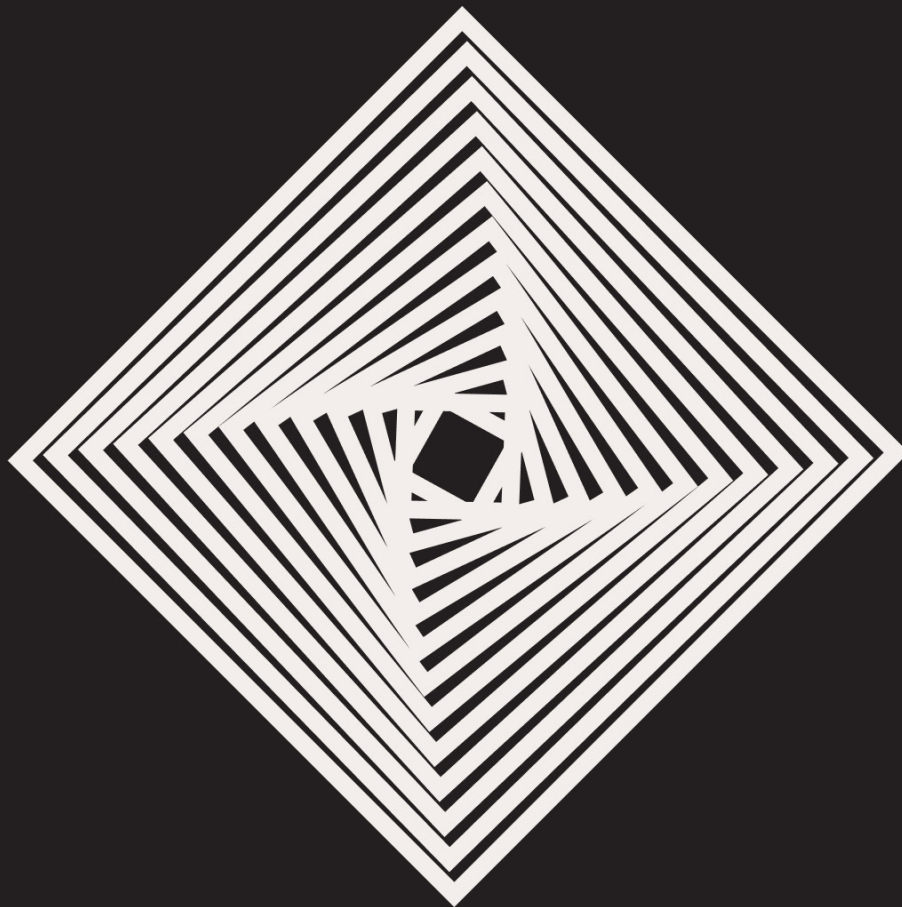


# The Financial Advisor Website Accelerator Formula



# Hello & welcome.

Thanks for downloading.

Before we kick-off, let me quickly introduce myself so you know why the hell you should listen to me. I'm the founder of [The Objective Brand](#); a marketing and design consultancy for the pragmatic business.

I'm a designer by trade and am deeply passionate about it. I've taken on more all-encompassing roles over the years of working in marketing. I've spent most of my career marketing and designing for unsexy businesses, from HVAC corps and non-profits to industrial manufacturing and SaaS companies. I like historically underserved industries and the fun challenges they afford me.

I entered financial services with FormulaFolios, an RIA and wealthtech platform that managed just over \$1 billion at the time. As the marketing head, I helped scale it to over \$3.5 billion in under two years and earn the #10 fastest-growing private company by Inc. magazine. See some of the work we did [here](#).

In my time at FormulaFolios, I developed a close friendship and working relationship with the founder, Jason Wenk. In 2018 I left to join Jason's next company, Altruist, as the VP of Brand & Design. I oversaw all marketing and design from the top of the funnel to software UI/UX.

Over the past 15+ years I've designed hundreds of websites and in the past 6 years, dozens of financial advisor websites.

As the world becomes more and more remote work-based, the more important your web presence becomes. Your website can be a powerful tool that generates quality leads, builds your brand value, and helps retain your current clients. This guide will walk you through how the best financial advisor websites are constructed.

We'll begin by looking at some examples and transition into the anatomy of how you should build yours.

# Stories over facts.

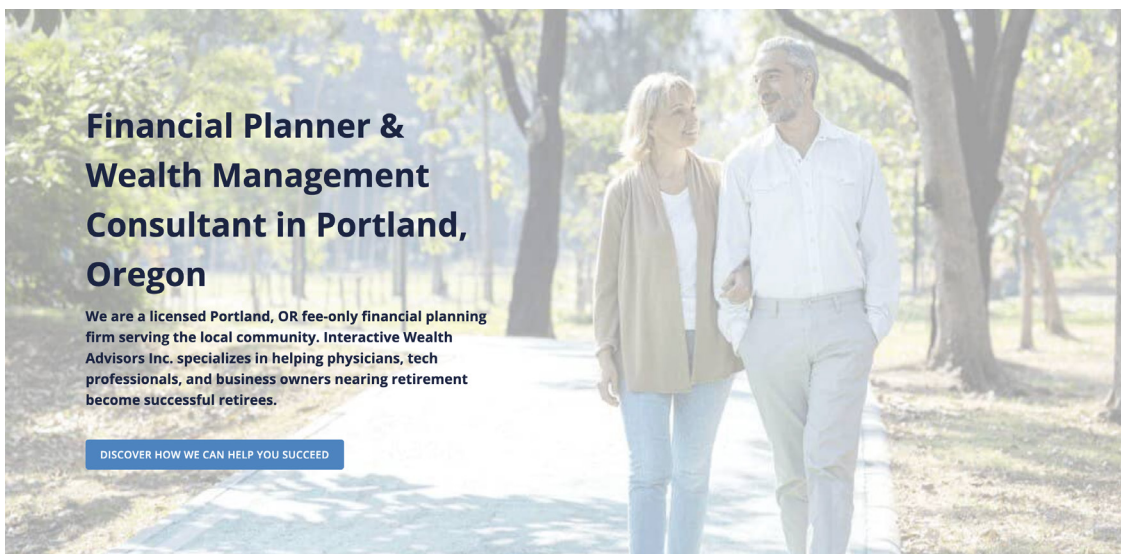
At the core of your website is your brand message. Before you can expect a cold prospect to reach out and inquire about your service, you need to demonstrate your value.

And the truth is, your value is only as good as your ability to articulate it.

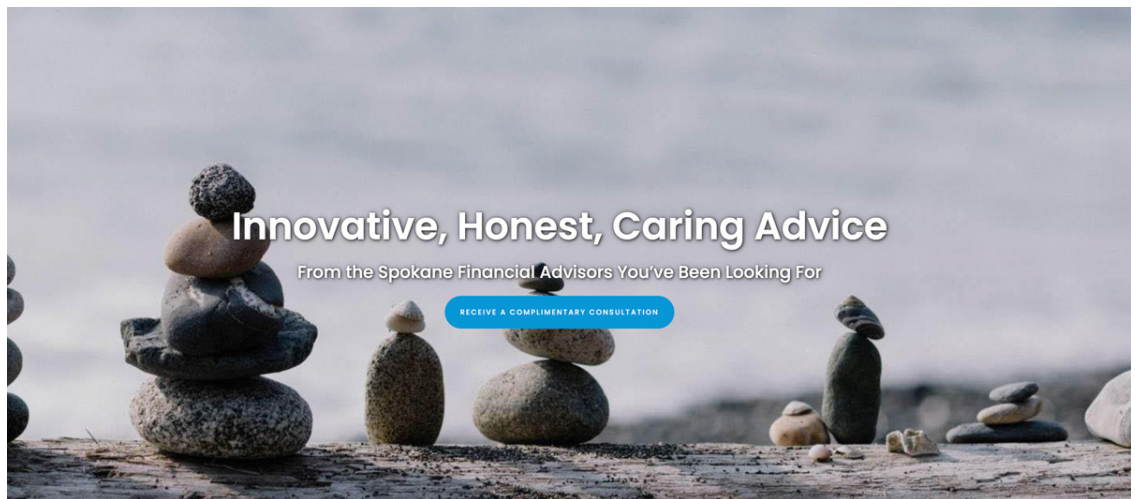
People connect with narratives, not things. We're beings guided by our feelings, and no matter how much logic is in front of us, we make decisions emotionally.

We also make decisions subjectively and care most about our own experiences. Stop trying to convince clients or prospects with fact-based logic about you. Make it about them. Facts are important and help support a decision, but they're not what pushes someone over the edge.

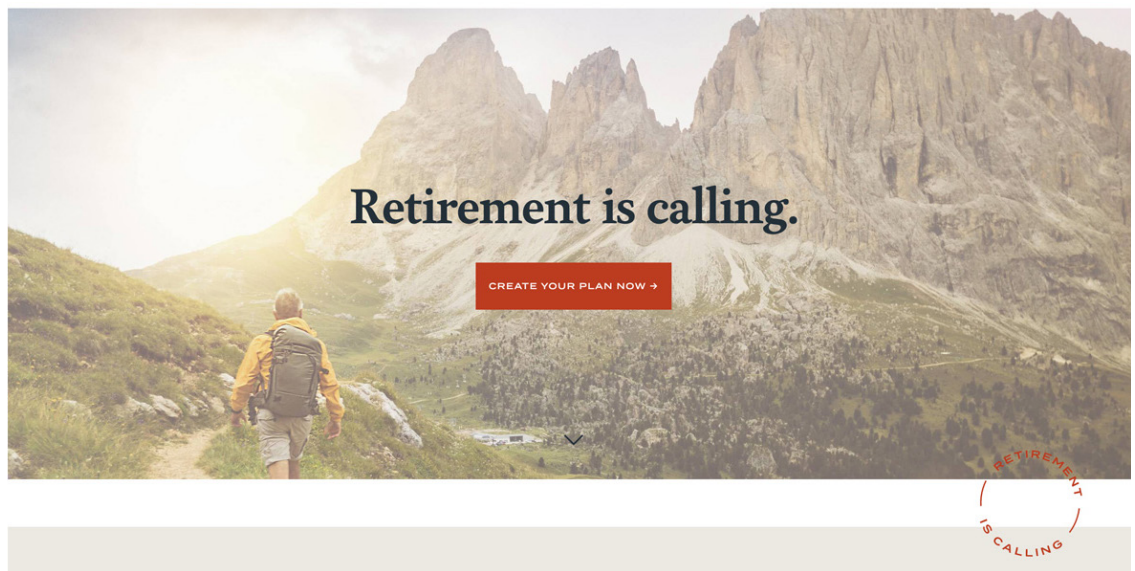
Let's look at a few examples to illustrate the point (found at random):



Want a formula for boring? Make your primary marketing message: <a firm> in <b city> offering <c service>. \*yawn\* These are facts about you and don't relate to the prospect at all. It does nothing to sell me why I should act and reach out.



A little better here; at least we're using adjectives. But they're still descriptions of your business. P.S. the "free consultation" is the lamest offer you can put together. It's tired. More on that later.



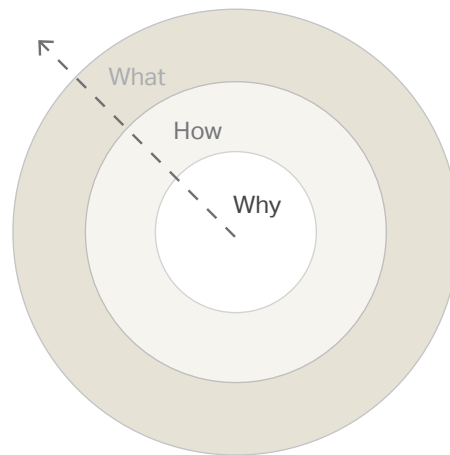
I cheated here to show you a good example from a project I creative directed. Retirement is calling is a simple line that does a lot when paired with a beautiful image. I can imagine my retirement waiting for me; we're creating a feeling for the reader. It's about them and their personal experience. We're also using an attractive call-to-action: create *your* plan. It puts me in the mindset of doing something productive and tangible rather than simply talking. I want to click it because I want a plan. (Notice it's *your* plan, not *a* plan)

# Start with why.

Now, this is only half the formula. The hook is about what you can do for the potential client, but to create real value and close the deal, you'll need more substance. "What can you do for me, and why should I trust you?"

If you're unfamiliar with the "start with why" mindset, do yourself a favor and [watch this short snippet](#) from Simon Sinek.

The crux of the concept is simple: most companies lead with what they do and how they do it. But the most successful brands lead with *why* they do what they do. Grounding yourself with the most basic facts of your business: "why the hell am I doing this?" is the best place to kick off any brand or messaging initiative.



“

When people  
put their kids  
to sleep,  
nobody tells  
bedtime facts.

Jonah Berger

My good friend Jason Wenk gave this nugget to advisors in his coaching: people hire you because they like and trust you. It's a stupidly simple statement that couldn't be more true. Forget about performance, price, or any other factor. Chances are, your best clients choose you because they like you and they trust you. People like and trust you if they believe in the intentions behind what you do. If you're just trying to make a buck off someone, they'll pick up on that.

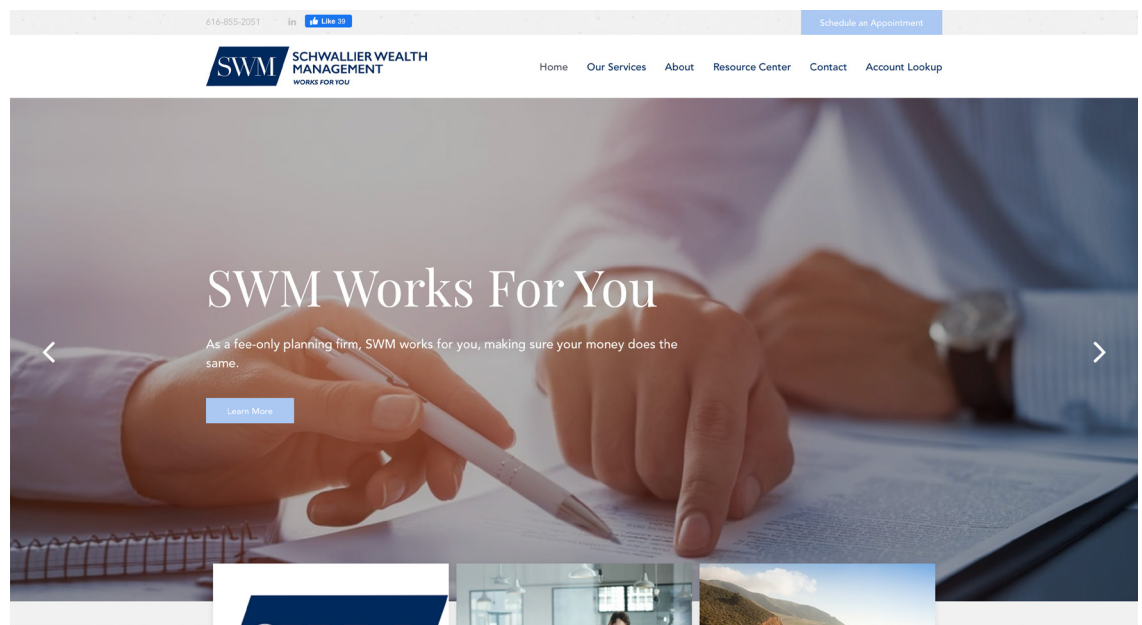
Another gem from Jason: "your vibe attracts your tribe." The best way to find the people you want to work with the most (those who are like-minded) is by clearly communicating your purpose. It's essential to be authentic about it, or it'll fall flat, and you'll hate doing it. This is also the best way to weed out poor-fit clients.

That's as far as we'll go into the topic in this guide, but please know that a quality website is only as good as the brand it's built on top of. It's important to do the legwork or it'll fall flat. Let's look in detail at some more examples.



# Reviews.

Let's look at a few examples of the good, the bad, and the ugly of advisor websites and brands. These short case studies will help you know what to look for. I found the “bad” at random, and I understand if it feels like a beat-up session. We're among friends here, and it's all in the spirit of your growth.



## ✗ Generic, cheap-looking stock photo

- People connect with faces; they pull users in and convert at a higher rate. Help put the visitor in the shoes of the person in the photo.
- Do your best to choose stock photos that don't look cliché. Use scenes that look and feel like real life. [Stocksy](#) is my favorite stock website. \$30 for a quality photo is worth it, especially if it's your hero image (the first thing people see when landing on your website).

✗ Generic primary headline

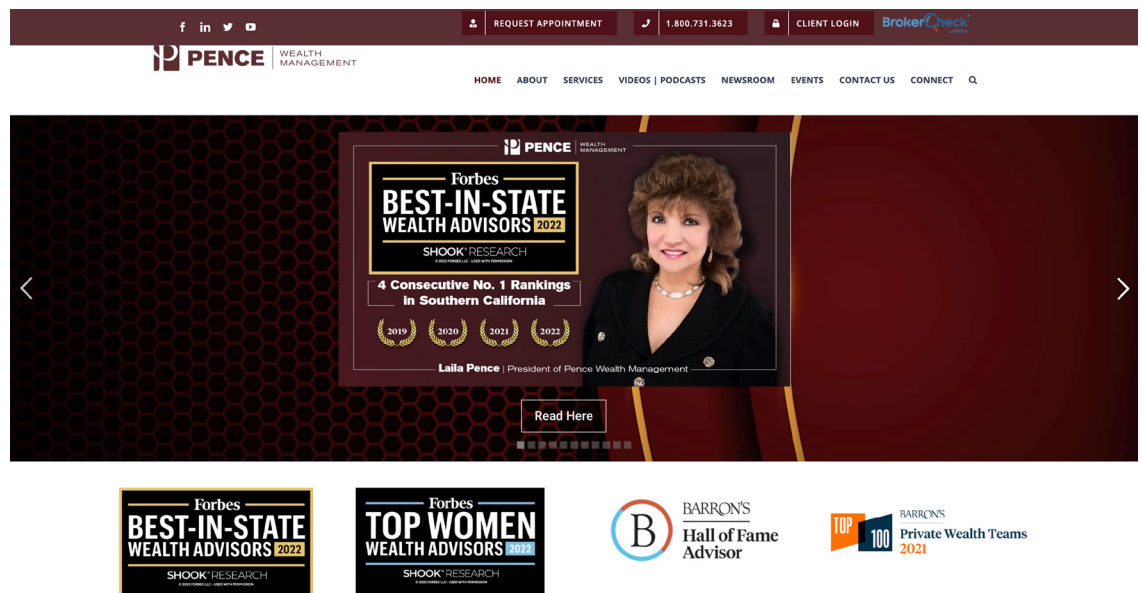
- Does nothing to create a feeling.
- States the obvious, nothing unique to this business.

✗ Subpar calls to action (CTA)

- CTAs on the page look the same. Where do you want me to look?
- The white text on light blue does not stand out. It's hard to read and doesn't capture my attention.
- Do you want me to learn more or schedule an appointment? Pick one and put any secondary CTAs below the fold (the fold is the screen viewing area).

✗ Unattractive design

- Far too much blue and gray, and the logo is rigid and dull. It feels like a sterile corporation. Add some warmth and humanity to your brand.
- Don't use carousels; there's an 85%+ drop-off by the second slide.

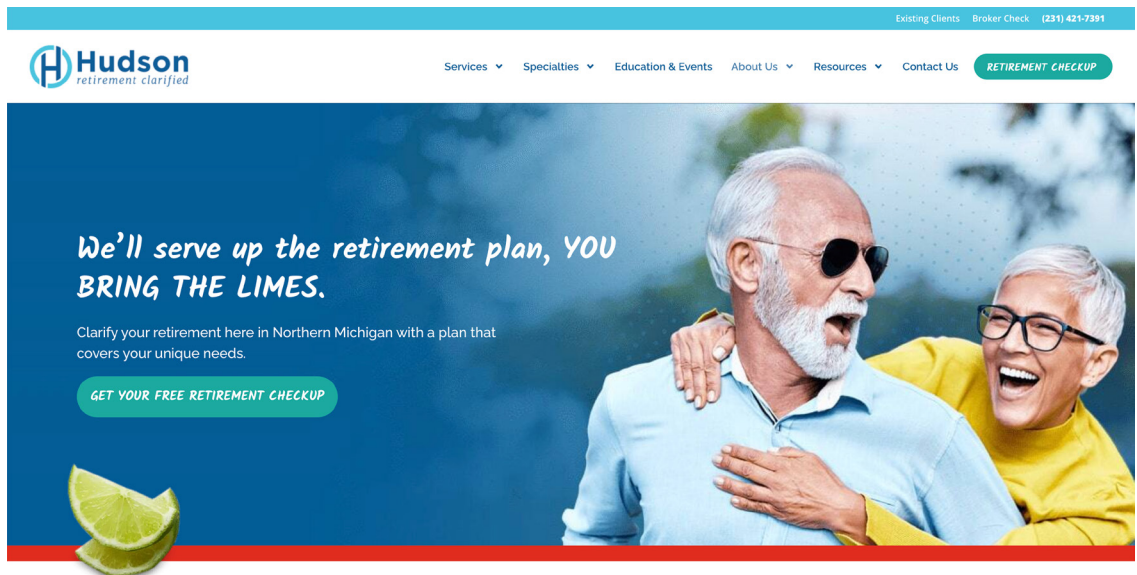


✓ Lots of third-party validation.

- When others say it about you, it holds much more weight.

- I don't suggest putting it so high up in the order of operations, but it's great supporting material on your homepage.
- ✓ **Solid logo.**
- It won't win any awards, but it's simple, bold, and strong. It'll stand out well in small sizes and among a crowd of overcomplicated logos.
  - However, the website already screams wealth management all over. It's unnecessary to place subtext next to it and add clutter.
- ✗ **Cognitive overload—way too much happening.**
- Holy burgundy. Overdoing it with color means nothing stands out. Keep things on the monochromatic side with small pops of color where you want the user to look the most (i.e., logo and CTAs).
  - Way too many links. I wouldn't know where to begin. Don't be afraid to spread your information. Keep your website's top section hyper-focused on a strong headline with a short value proposition and an easy-to-see call to action.
  - When you put too many choices in front of a user, they tend to bounce away. It's just too much to take in. Think about the way people process information. What do you want them to see first, second, and third? What do you want them to do?
- ✗ **Stuffy photography.**
- Look, a professional studio headshot may work well for your LinkedIn bio, but it's far too stuffy for this use case. Instead, focus on lifestyle shots. Keep it casual and in an environment. Not a disembodied bust shot. [Here's an art direction document](#) we created at Altruist to help choose quality photos. My friends at [Oakmont](#) did a great job with their photography; they do a wonderful job of showing what it feels like to work with them. Click through their website for inspiration.
  - Using real photos of yourself is great, so they get points for that. But remember, the hook isn't about you; it's about your audience. Photos of yourself should be supporting material.





Okay, we're starting to heat up here. The design leaves a lot to be desired, but they're hitting a few spots well from a communication standpoint.

✓ **Strong headline.**

- They're making it about me and creating a feeling. I imagine myself on a beach with a margarita and lime. It's a bit cutesy, but retirement-aged folks love that stuff.

✓ **Attractive call-to-action.**

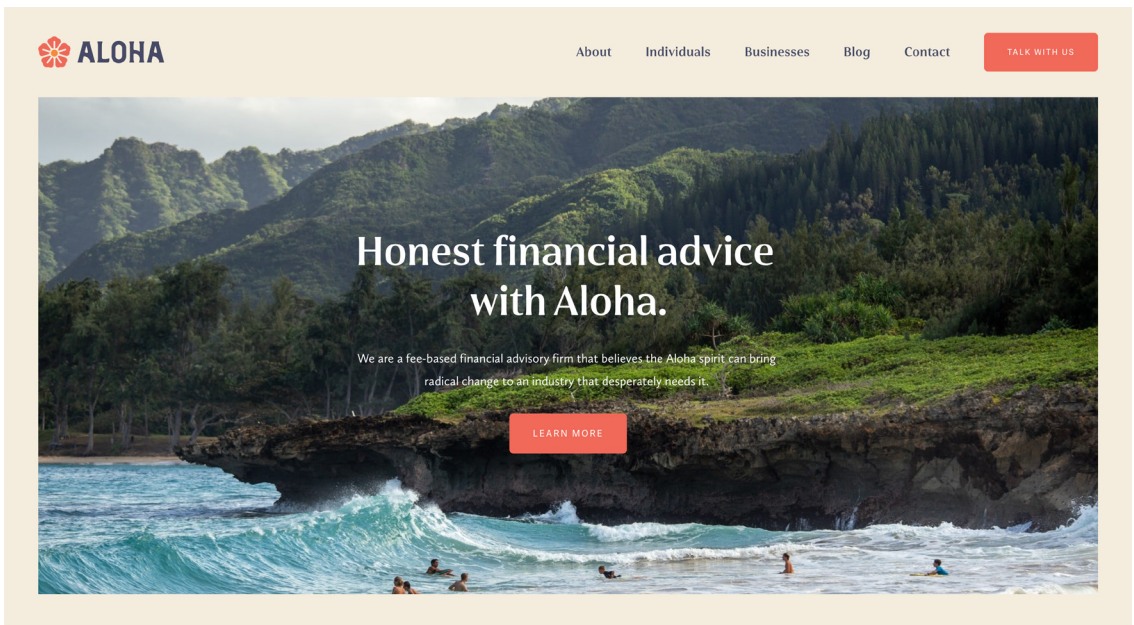
- I'm likelier to click this because I get something tangible out of it. There's still an easy-to-find contact page and phone number if that's the route I want to go. But this CTA gives me something of value.
- Realistically, it's probably still a standard "free consultation," but they've branded it and made it sound more attractive.

✓ **Photos that shows people and faces.**

- Ideally, we'd see more of the environment so I could picture myself in their shoes. I'd also prefer to see more realistic-looking people here; this screams stock photography. But they're happy people enjoying life; it contributes to creating a feeling. Pro tip: everyone wants to imagine themselves as ten years younger than they are. If your target is retirees, use photos of people about 55.

✗ **Too many fonts and colors.**

- It's a bit oversaturated and is edging on cognitive overload. Stick to two fonts at most: your primary headline and your body copy.



Finally, a design that's on point—I'm cheating a bit again here since this was created by a designer previously on my team.

✓ **Minimal design.**

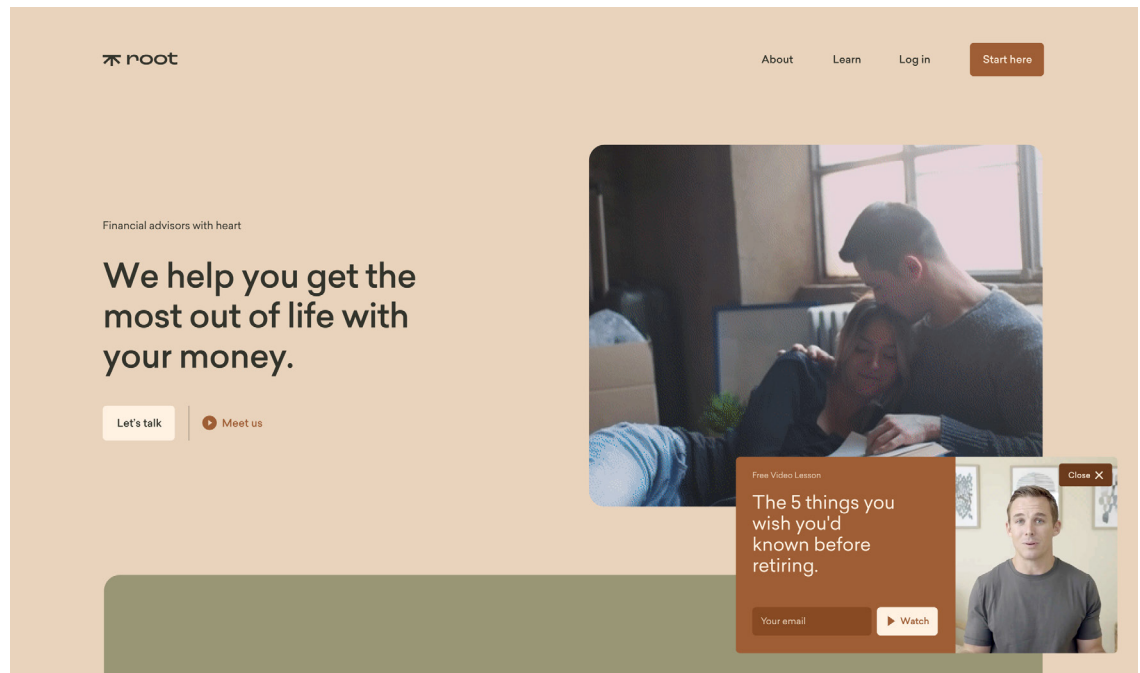
- There's no question where I'm supposed to look. The headline is stark, the logo is bold and beautiful, and the CTAs are begging you to click. There aren't too many colors or fonts.

✓ **Strong photography.**

- Ideally, we'd see people close so we could make out faces. But it's a beautiful photo and shows people enjoying life. Whether I'm a surfer or not, I can empathize with those feelings. It creates a vibe.

✗ **Generic headline and CTAs.**

- While the design hits the spot, the copy could work harder. There's a lot of missed opportunity in relating to the user and compelling them to take action.



This is a project for a client of mine still in development. But I wanted to illustrate how you can create a feeling by taking advantage of more than just your copy. [See it live here.](#) Video is an incredibly powerful tool. Bounce rates can be reduced by as much as 34% when you put a video on your homepage. ([Here's another example of video done well](#) from an old project my team worked on.)

✓ **Minimal colors and fonts.**

- The most prominent orange color only appears where I want the user to take action. There's no question about what you're supposed to do.
- With some smart choices with copy and video, we can cut down to the bare minimum and keep the user's attention hyper-focused.

✓ **Creating desire.**

- Shoot, I want to get the most out of life with my money.
- The video helps relate things back to me and create a feeling so that the headline no longer has to, and we can accomplish more with less.
- I want an advisor that helps me feel like the people in the video.
- There's also a brand video the user can watch to get a quick look into the real live personality of the people they'll connect with.

✓ Capturing cold leads.

- If someone isn't ready to talk yet, there's an attractive offer in a pop-up and all it takes is a quick drop of your email. The low barrier to entry is key. Now this advisor can drip on that prospect and warm the lead up over time.

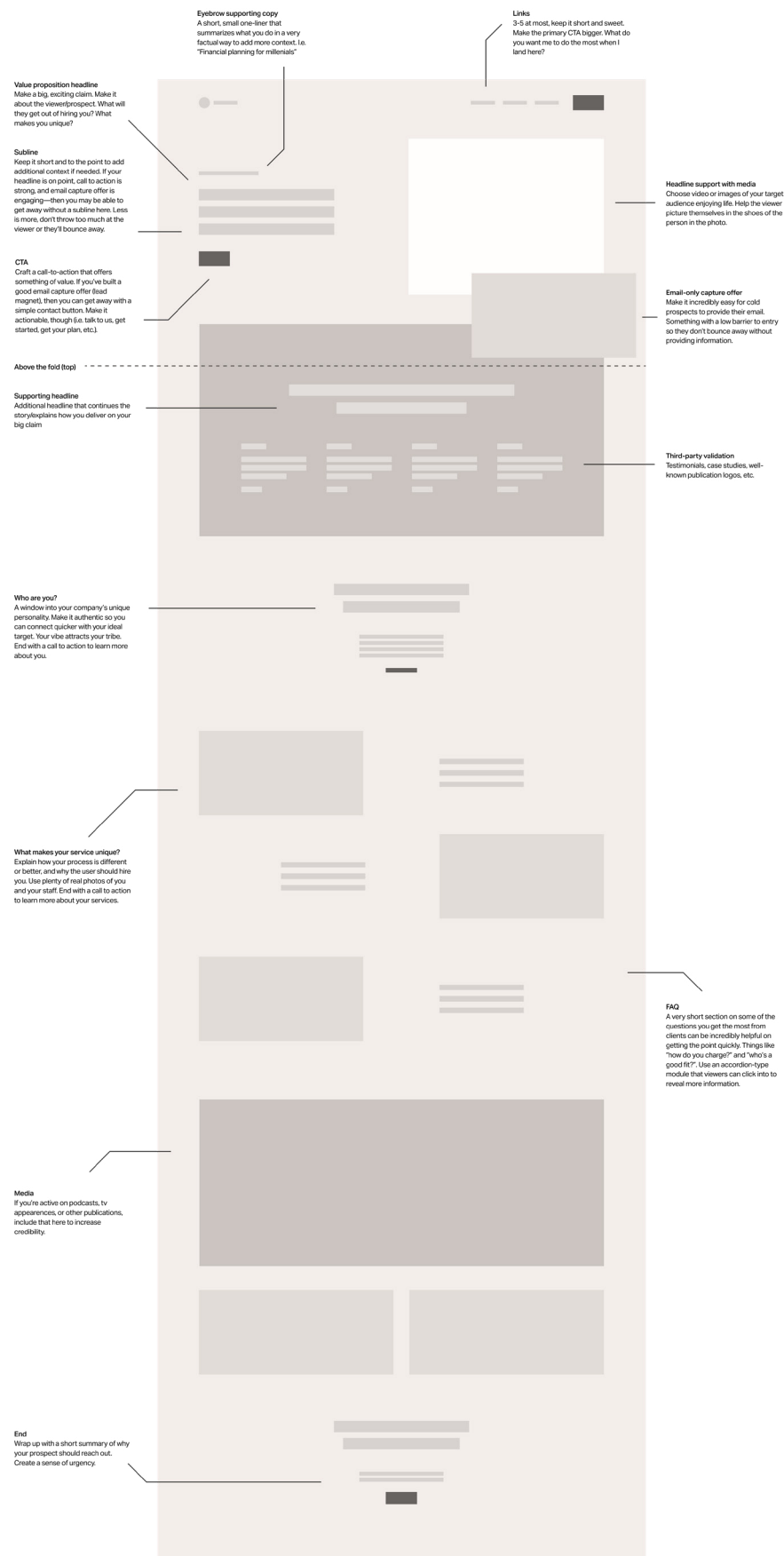
It's worth mentioning that your corporate website homepage should use a different strategy than a sales or landing page. The audience who lands on your homepage is typically at least somewhat familiar about who you are and what you do, so it's more about building your brand and reinforcing your value. This type of audience is there to do more research and is in the consideration phase of their buying journey.

A sales page that you send cold traffic to (awareness stage) should be much more hyper-focused on conversion. There shouldn't be any other navigation outside of the opt-in, and the headline and messaging will be a lot more tangible and focused on an outcome, less so on creating a feeling.

If you don't have a quality lead magnet to offer as a cold prospect capture tool, use this formula to craft yours:

- Offers an Ultra-Specific Solution
- Promises "One Big Thing"
- Speaks to a Known Desired End Result
- Offers Immediate Gratification
- Moves Prospect Down a "Continuum of Belief"
- Has a High Perceived Value
- Has a High ACTUAL Value
- Rapidly Consumable (implemented)

# The Blueprint.





# Closing.

Let's recap. Here's the 6-step formula for building a high-converting website:

1. Communicate your “why” and give a window into the unique personality of you and your business.
2. Lead with a big claim that's about a benefit to the viewer, not facts about yourself.
3. Use imagery that helps the visitor put themselves in the shoes of the subject and visualize what it feels like to work with you.
4. Make it incredibly easy and compelling for the user to leave their email if they're interested in your services, but not ready to pull the trigger (which is most visitors).
5. Don't overly clutter it with too many fonts and colors, and hyper-focus on a sequential story you're trying to communicate.
6. Include clear, strong calls-to-action.

If this guide resonated with you, checkout my full, in-depth [Financial Advisor Brand Bible](#). It's a no-bullshit guide for financial advisors to create an efficient acquisition and retention funnel. Learn how to stop spending excessive time or money for leads and craft a thriving brand presence that fosters a sustainable system of happy clients.



“More valuable information for a few hundred dollars than I got for \$15k with industry consultants. This is a terrific book with a lot to get you going.

John Montgomery



[Get it here](#)

